

CLUSTERS AND INNOVATION IN ECOTOURISM DEVELOPMENT

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Extract

Competitiveness, innovation and the national innovation system (NIS) which connects them, have been transformed and are continually changing in our post-industrial society. This essay investigates the origin and the changes of such systems as well as their main models.

The modern state does not only subsidize the *competitiveness* of its own *national economy*, as its competitiveness firstly *depends on the underlying innovative environment*, the so-called ‘innovation milieu’ and the *national innovation system*, which binds the system together.

At a national level it is indispensable for the development of innovation, that the economic policymakers build up a coherent system for promoting tourism.

Other tools exist for the development of ecotourism in our region beyond financial sponsoring and these state measures can also be realized. A study of economic co-operation systems and clusters together with innovation progress shows the Italian economic model as one of the most successful in modern Europe.

The research on ecotourism clusters and a perceptual research in ‘Belső-Somogy’ Ecologic Network are the basis for developing an ecotourism cluster model which is applicable in the Hungarian National Parks and Nature Reserve Areas.

Introduction

This paper gives an overview of the economic paradigms, innovations, co-operating systems and clusters that make Italian economics – being one of the most developed ones in the world from all aspects – one of the most successful regions of the modern Europe. The authors selected the experiences gained in economic development of the Italian economics as an example based on mainly small and medium

side enterprises (SMEs), which are assumed as elements that can be implemented in South-Western Hungary and in the regions of South-Eastern Europe, which are facing similar challenges.

The Hungarian tourism destinations and their suppliers typically operate separately with different efficacy. They compete with each other for the tourists. Harmonising of the nature conservation and ecotourism may be the basic answer to the sustainability of these destinations. While the number of visitors is increasing at Lake Balaton and Budapest in Hungary, the ecotourism attractions situated far from these mass tourism destinations are unexploited.

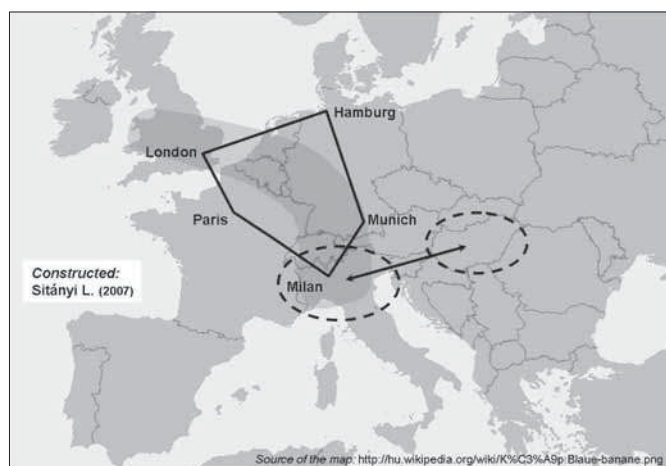
For creating an ecotourism cluster model for the Hungarian National Parks and ecotourism destinations, the authors analyzed the Italian experiences in clusterisation, and implemented a pilot research on ecotourism clusters, applying the Delphi method and a case study in ‘Belső-Somogy’ Ecological Network, one of the most coherent ecotourism destinations in Hungary.

Short evaluation of Italian-Hungarian relations

As a highly populated, urban area situated to the south from the Alps, Italy has always played the role of a more developed partner for Hungary. In the medieval times this area of Italy that is located beyond the mountains, with its resources and bright culture has always attracted Hungarians; providing lessons, modernisation patterns and tangible material benefits

The Italian North (and more recently the North-Eastern and Middle Italy), which is the southern part of central Europe and within the most developed area of Europe (e.g. “Blue Banana”, “European Pentagon”) is worthy of study. Our relation with the North Italian Po-river-region is, we believe, as important now, as the issue of the sea route connection used to be for Hungary in medieval times.

Fig. 1: *Blue Banana*, *European Pentagon*



Elements of the relation of the two countries

(roads, traffic lines, energy suppliers and information lines)

Geographical scientists give Hungary eight different communication routes (ERDŐSI F. 1996) These are the following:

1. Western (Budapest-Wien),
2. South-Western “Adria”-corridor,
3. North-Eastern “Borsod-Galicia”,
4. Northern “Tatra-Krakow”,
5. Eastern “Subcarpathia-Podolia”,
6. South-Eastern “Pontus-Levante”,
7. Southern “Suez” and
8. South-Western “Slavonian”

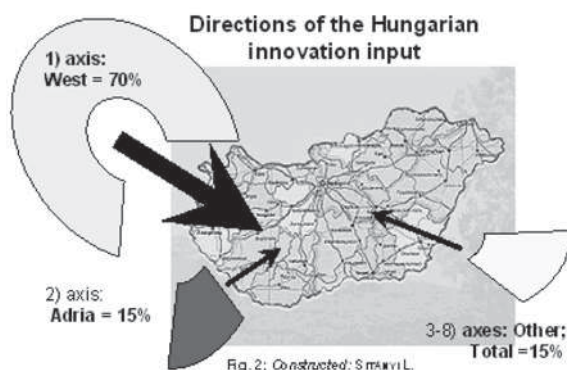


Fig. 2: *Directions of the Hungarian innovation input*

These channels each have their own importance and their features differ widely. Looking at the Hungarian-Italian relation, the most important for us is the South-Western “Adria”-axis, of which place, role and importance are outstanding from the other communication directions. Of course

the priority of the Western main direction cannot go unmentioned, significant traffic passes through it. It is the most important innovation corridor of Hungary. (RECHNITZER, 1993). It accounts for some 70 per cent of the developed technology, know-how and licences entering Hungary. (ERDŐSI, 1996) The South-Western international “Adria” is also an important innovation corridor and is similar to the “Western corridor” from many aspects, although with much less capacity and traffic. Despite leading to much fewer countries with much less innovation potential (Croatia, Italy, Slovenia), nevertheless 15 per cent of the input innovations come from this direction alone, leaving the remaining 15 per cent to be shared by the other six communication directions. (FIGURE 1; *Directions of the Hungarian innovation input*)

According to ERDŐSI (1996), eight components of the so called “Adria” corridor are differentiated. Its basis is two international electric railways:

- 1) Budapest-Nagykanizsa-Murakeresztúr-Trieszt¹ and
- 2) Budapest-Dombóvár-Gyékényes-Zágráb/Ljubljana-Fiume-Venice (-Rome)
- 3) The vehicular traffic is based on the motorway and highway between Budapest-Ljubljana.
- 4) Its further components are the international coaches between Budapest-Venice
- 5) Flights on the Budapest-Ljubljana-Milan-Spain/North-Africa corridor and
- 6) Budapest-Ljubljana optical cable of 10 fibres.
- 7) Important energy suppliers are the Adria oil pipeline² from the Krk island, and
- 8) a 120kV high-voltage power-line between Hungary and Croatia (Varasd).

Economic review

Italian culture has always had a strong reputation in Hungary from medieval times, although strangely this can not be seen in the economic figures nor in the business life, according to our research. In 2005, Italy provided 5.4 per cent of the Hungarian import with 2.4 billion HUF (and Italy is the sixth most important trading partner) and 6.3 per cent of the Hungarian export (with 2.6 billion EUR) staying at the third place. Contradicted, *Italy is only the ninth* among the stakeholder *investments* (between 1999 and 2003).

In our subjective opinion, the first reason for the low rate of entrepreneurial activity exchange are differences in the entrepreneurial thinking. While the German or English-speaking investors are provided with all business information, the Italian businessmen are often not taken seriously. As a so called “*confidence level*” necessary to start a common business is missing, the otherwise pleasant meetings end without real business relations being formed.

Secondly, despite there being some large companies in Italy, the Italian economy is typically based on the SMEs. The majority of these Italian enterprises are small and practically family based companies. Their operation management is rather informal, which also influences their relationship with Hungary. Although, a few significant Italian large companies³ invested in Hungary; the small and medium sized companies dominate with all their advantages and disadvantages. The number of Italian companies is 2400; the value of the investments is 2 billion Euros. These

¹ Ro-La operation.

² It is going to have a key role on the oil supply of Hungary in the future.

³ Italgas (service), Agip (service), Boscolo-group (hotel industry), a Benetton (clothing), SanPaolo-IMI (Inter-European Bank), Intesa BCI (CIB Bank), Iveco (bus industry), ENI (chemical industry), Generali (insurance), Pirelli (cable production), Zanussi (home appliances), Ferrero (sweet industry), valamint a Sole (dairy industry).

figures also show that the average Italian investment per investor is much lower than the Hungarian average (especially if the occasional, single giant privatisation investments are taken out). This practically means the SMEs. (KSH STADAT, 2004).

The figures of the Hungarian Central Statistical Office (KSH) also support own *empirical surveys*. It was found that in case of Italian enterprises, organisations run by Hungary at interstate level are less efficient.

There are good chances to improve the intensity of the relations and to exploit the unused potential; although it is necessary to understand the Italian cultural features, ideology and entrepreneurial thinking.

Even though Italy is geographically close the existing system to encourage the foreign investments (which is mainly socialised for the German, American, Japanese and Western European large companies) cannot treat efficiently the Italian economic interest that is typically based on numerous small enterprises and represents a very different ideology.

If we want to use the potential for development, a system is necessary which is locally strong, individual dependent and based on subregional approach and endogenous sources, and which encourages entrepreneurship and considers the cultural, linguistic and size differences. Thus, if we want to catch up and improve the capital attractiveness of our region, an innovative development based on endogenous sources is necessary. In order to achieve this goal, an innovative surrounding is needed to build, which is appropriate to receive the SMEs and stimulates developments. In this work, the experiences gained from good examples based on SMEs of the “Third Italy”⁴ can be used well.

These examples are also proved by the apparently paradox fact that the development of the local economies was strengthened by globalisation all over the world, as each successful answer given for global challenges is built on endogenous sources and their local use (MATOLCSY Gy. 1998).

Innovation environment, development based on facts

The elements of strategic planning *need to be based* on facts, results of surveys done and *the reality*. It is always necessary to carefully analyse the innovative environment. Innovation and R&D should not be escapism.

Capital in cash and asset is also important; but contrary to the general approach the main questions is not the own capital available for innovation or the govern-

⁴ North- and Middle-Italy, the quadrangle of Verona, Venice, Ancona and Bologna

ment's grants. According to researches, *success* does not depend on the support of the government, but primarily the *environment, milieu of the innovation*. (CAMAGNI, P.R. 1992)

The paradigm shift in the innovation approach and new demands laid greater emphasis on a wide and decentralised net of institutions that promotes transfer of knowledge and technologies, beside Research and Development. Research and technology parks, innovation and technologic development centres that suit these requirements will build wider relations and network among the economic actors, which fits better the local regional economic and social environment, and which is based on smaller transfer centres.

Features of the Italian model

The keys of this bottom up model based on endogenous sources are the local economy, the technological level, human resource, the development of entrepreneur environment and to build an SME sector that partly on its own is suitable to run the local economy and secondly attracts outer investors by supplying appropriate background services.

Main characteristics

- A set of tool is necessary to encourage the local companies not to reduce wages but to search for other factors that improve effectiveness and provide comparative advantage.
- It is necessary to promote innovative technologies and specialisation of local companies.
- The local economic policy needs to change for a knowledge and technology-based policy. Its key elements are: the local infrastructure of information, quality management, education, training, research and business consultancy, up-to-date marketing and promoting technological diffusion.
- The local SME sector can play an important role in that, by functioning in two ways. Firstly, the number of economic actors and small individual units and the numerous kinds of approach are the basis of a diversification of the economy that can even defend the local economy against an exogenous crisis⁵. Secondly, this type of company answers well the local economic advantages and provide a homogenous production culture.

⁵ Contrary to other developing Asian economies (such as the industrial consortiums, multinational and Transnational corporations of South-Korea) where serious crisis was seen due to the exchange crisis of Asia, the economy of Taiwan felt it hardly, which is built on small and medium sized enterprises.

- The main advantage of the homogenous structure is that the transaction costs are kept to a minimum, and it allows the qualification of the local labour force an economic advantage. Due to this it can attract serious investments.
- The economic potentials of local demand should also not be ignored. This needs to be considered in the local socio-policy, environment protection and privatisation, as well. An appropriate use of these can lead to such a strong cohesion, which induces many advantages not least in the demand side of the economy.
- Research and development is an important part of the adapting potential of the local economy. However, technological changes are not only induced by costly research projects of large multinational companies. Small innovations of local companies can be at least as important, especially if we consider the value gained by the strengthening of the local economic relations.
- Improving this cooperation of local actors and the market flexibility of the local manpower, both are advantageous.
- One of the most important elements of the modern economic development is building strong “relation-networks” and clusters. It is important to improve the quality of relations within the local society, between the economic and political life and also with other regions.

Development of clusters

The definitions for innovative groups, clusters became well-known in the last decade, which have appeared sharply in the pharmaceutical and automotive industry and the informatics in South-Eastern Europe. Even in these days, these are used at many times as the synonyms for intercompany and supply relations. As well as earlier in many times, if we look behind new or fashionable terminologies, old and already known phenomena will be found. Let's take as examples a few most known, old and still successful “clusters”, such as perfume and fashion industry in Paris, the Dutch flower production, the Finnish wood industry or the “chair-triangle” in Northern-Italy. We believe that studying the Italian processes leads to an outstandingly important message for us in the current Hungarian situation:

- Development of a cluster or a wide cooperation between groups does not necessarily belong to any fashionable sector; in addition, those that have been functioning for a long time are built on traditional industry or products;
- The majority of these use local resources, tradition, local culture or the reputation of a given area. Where preconditions can not be found and are artificially created,

the development of the cluster⁶ is slow, complicated or too expensive, and the cluster will not become or very slowly the part of the local economy;

- A well structured cooperation is able to compete with the cheap countries of the global economy – even in case of traditional agricultural or industrial products that are said to be downsized.

Innovative companies rarely act separately in their innovative work. In order to improve their knowledge and know-how, they increase their interaction with suppliers, consumers, competitors, universities and research institutions. Cooperation of companies is the most important channel to share and exchange knowledge. One of the biggest challenges of the modern economic policy is to stimulate this process.

In successful regions, a network of companies, universities, research institutions, technology-suppliers, bridging organisations and corporate clients is created, which forms a value-added production-service chain. As these groups develop further, after a period of time they grow over the corporate networks and involve all forms of the distribution and exchange of financial services and knowledge necessary for the operation. This is called cluster.

In a series of countries, such innovative clusters of economic activities attract new technologies, qualified labour and research investments as a magnet.

As practical regional developers we must do something against the sinking of our narrower or wider regions; we need to induce this process in areas that have not developed clusters, yet.

The pilot research on ecotourism clusters in Hungary applying the Delphi method

In the course of the research a four-round questionnaire was applied which is suitable for Delphi method. The establishment of the initial panel and the selection of the expert member group for participation, required intense foresight. It was essential that the summarising report of the research was on the basis of the answers of the panel members representing the different areas of specialities. According to the opinion of tourism experts an initial panel of 30 people was set up in Hungary. In the selection process of the panel members it was important for us that both tourism and ecotourism experts were well represented ; but – regarding the complexity of the theme – it was also necessary to represent both the fields of nature conservation and cluster by their experts, in an appropriate ratio.

⁶ Although there are functioning examples for these, because of the high costs we believe this would not be viable in short term in South-Eastern Europe.

The results of the Delphi research

After the first two rounds of the research our observations relating to the answers of the questionnaires were the *fundamental differences* between the approach of the nature conservation, tourism and the cluster experts.. While most of the tourism experts agreed with our statements, the nature conservation experts were wedded to their opinion of opposition and could hardly agree with even the softer approach of tourism or did not agree at all. The cluster expert who has been the main supporter of our research theme drew up his opinion in some questions, which made us rethink the definition of the ecotourism cluster.

The third round of the Delphi research had a more successful ending, despite the small number of the returned answers. The generality of the experts agreed with our statements and the defined sequence of the characteristics of the cluster. The former criticisms and the proposals of the cluster expert were integrated into the present definitions and statements. We realised that the main elements of the success were that we managed to develop a unique rapport with the experts and to sustain their interest during nine months. The results of the research are the definitions and characteristics as follows.

The final definition of Ecotourism cluster

System based on the uniform utilisation and nature conservation principles and the facilities of the land, in which the nature conservation and tourism enterprises and organisations take part simultaneously competing and cooperating with each other, for reaching more economic and social benefits. They accept as a common aim the development and the preservation of the harmony between the nature conservation and the presentation of the natural values. In this organisation tourism does not exceed the environmental capacity of the destination together with the other local economic activities.

The degree of clusterisation:

- Partnership based, **regional development aimed, collective organisation** having its own management, which aims to realise common developments.
- Cluster, as a **network cooperation**, to contribute to the enforcement of the common welfare and the social cohesion and to serve as a quality assurance system, regarding the natural conservation and the tourism services, and to operate as a trademark system.
- The cluster as an **economic cooperation based on the ecological values**, beyond the network cooperation is a concentration of the organisations, not membership

based but rather a cooperation of infrastructure, organisation and services regarding the service elements of an area.

Interpretations for pragmatic adaptation

Ecotourism clusters can be interpreted as supply systems relating to tourism and natural environment, which are market and services principled. They are established regarding the tract, habitat characteristics and the destination.

The *main objective of the ecotourism cluster* is that the organisations participating in it realise more economic profit than they could as independent organisations in the market, while more tourists are coming more steadily all year around while the natural values are conserved and sustained jointly.

The development of the ecotourism cluster:

1. The potential participants have recognized the need for cooperation.
2. There is mutual confidence between the participants.
3. The common objectives have been identified.
4. The distribution of tasks amongst the organizations has been defined, which can be redistributed during the operation of the cluster.

The characteristics of the ecotourism cluster:

1. It can be connected to a relatively well understood territorial unit (e.g. region of Danube-Drava). (not necessarily conforming to current administrative or statistical borders)
2. There is a close co-operations, common values, goals and ongoing dialogues between the participants
3. The participants are able to explain synergic effects on each other in their participation of mutual confidence organisations (in the fields of natural conservation, environmental conservation, tourism, relating services, infrastructures). They are able to define cluster specific services and development ideas for reaching the common goals.
4. It meets the requirements of the long-term sustainability of the tourism destinations.
5. Participation of committed cluster-members, assuring the financial background.
6. Establishment of the self-management and organisation.

7. Election of committed cluster-manager(s), with high level professional competence, wide-range regional, sectoral connection network and the support of the participants.
8. Efficient common marketing activities.
9. It assumes framing an underlying environmental consciousness, which aids both guests and hosts in their perception of the environment.
10. Quick and efficient flow of information and synergic effects.

Supply of experiences

Besides the ecologic values, the cluster integrates the specialties of the (folk)art – cultural aspects, traditions, the specialties of the local economic, civil participants (e.g. historical, traditional, fishing, sport, gastronomy, hand crafts, local agricultural entrepreneurs). Nevertheless, it presents the role of the bio-initiatives as well as the ecologic values (e.g. the use of natural materials, alternative energy, the handling of sewage and communal waste with bio methods).

Case study in the ‘Belső-Somogy’ Ecological Network

The perception research targeted the organisations and tourism service suppliers through the ‘Belső-Somogy’ Ecological Network. We focused on this territory, because it is an ecologically uniform and coherent area, where tourism enterprises are present; further more, nature conservation is led by a very active NGO, which owns most of the territories. The perception study was based on a questionnaire with 20 questions, in which we were interested in the cooperation network and the future expectations of the organisations.

The ‘Belső-Somogy’ Ecologic Network, which contains the target areas of this study, is situated to the South of Lake Balaton, and is accessible via good quality transport links (railway, highway, waterway). Most visitors to this area come to see Lake Balaton. There are also a great number of unique attractions in this area, which attracts tourists from all around the World.

In Hungary, the major attractions, apart from Budapest and Lake Balaton, are the spas and thermal baths and the cultural towns. In the South-Transdanubian Region medicinal/health tourism is one of the most important tourism sectors. The most significant architectural site is the excavated old-Christian cemetery in Pécs, which gained the title of ‘World Heritage Site’. The church in Máriagyűd is visited by thousands of pilgrims. The wine roads of the region e.g. Villány-Siklós (1999) have also become widely known.

The riverside of the Drava holds a unique natural value in Europe. It is one of the special attractions of the 50 thousand acre Danube-Drava National Park, as is the narrow-gauge railway in the forests.

The visitor centres and thematic exhibitions of the Danube-Drava National Park illustrate the values of the natural environment. A unique attraction is the Otter Park which is located in Somogy County in Petesmalom. The cognition of the natural values is served by the study trails and the guided tours organised from 2006 for the general public at fixed dates.

The results of the perception research in the area of 'Belső-Somogy' Ecological Network

During our case study we intended to reach and interview the tourism service suppliers related to the 'Belső-Somogy' Ecological Network, the NGOs, the Tourinform Offices and the National Park with our questionnaire. Unfortunately they were not disposed to answer our questions by e-mail. Only nine valuable responses were returned to us, but fortunately the responses were returned by different type of organisations. In this manner, this study can be evaluated as first sampling of the area. The respondents were from the three Tourinform Offices working in the area, the South-Transdanubian Marketing Directorate, the Somogy Nature Conservation Organisation, one craft worker, one municipality and an NGO working in the field of ecotourism (bicycle tour organiser).

Relating to the cooperation with other organisations functioning in their environment, surprisingly many of the respondents marked different organisations. Most of them cooperate with accommodations, tourist offices, craft workers, catering trade organisations, tour operators, municipalities and regional managers. They further mentioned sport organisations, traffic companies, marketing organisations, NGOs. The respondents know about nature conservation organisations of the region (Somogy Nature Conservation Organisation, Zöldfondosó Public Endowment and the Danube-Drava National Park). The questioned organisations are familiar with the tourism organisations of the area, but generally the ecotourism organisations are not known to them.

The interviewees sometimes meet excursionists, guided tours groups, bird watchers, horse riders, and more often bicyclists, out of the tourist groups.

Regarding to the tourism cooperation, most of the information offices mentioned the flow of the information. The regional organisation alluded to the marketing (primarily the promotion) and the product development, the quarter-master pointed out the room rents, the open-air schools, the conference tourism organisations, the craft

work exhibition, the master education, the tour guiding and the teaching in open-air schools. The bicycle tour organisers mentioned the development and ingress of ecotourism tour-trails, publishing of tour guides and tour maps, organising bicycle tours, the exploration of the opportunities of bicycle tourism, the discovery, planning and propagation of bicycle tour roads.

The respondents urged building a closer relationship with the quarter-masters, the catering trade organisations, the nature conservations NGOs, the organisations belonging to the national park, the forestry, the tour operators, the municipalities and the regional management organisations, in order to attract more ecotourists.

Most of the respondents do their marketing activities on their own and through mediator organisations with brochures, prospects, Internet and exhibitions in tourism fairs. Only the Regional Marketing Directorate deals with attracting and organising ecotourists; the other respondents try to give services to the tourists visiting the region.

In the field of international relations generally the organisations have no contacts. Only the nature conservation organisations are in communication with horse riding tourism organisations. In the 'Belső-Somogy' region, the respondents emphasised the importance of organised programme offers, and the cooperation in the assigning of thematic roads, the accommodation service, running camps and marketing. According to them, the cooperation is important between the nature conservation organisations, the national park, the expert organisations, the NGOs and the municipalities.

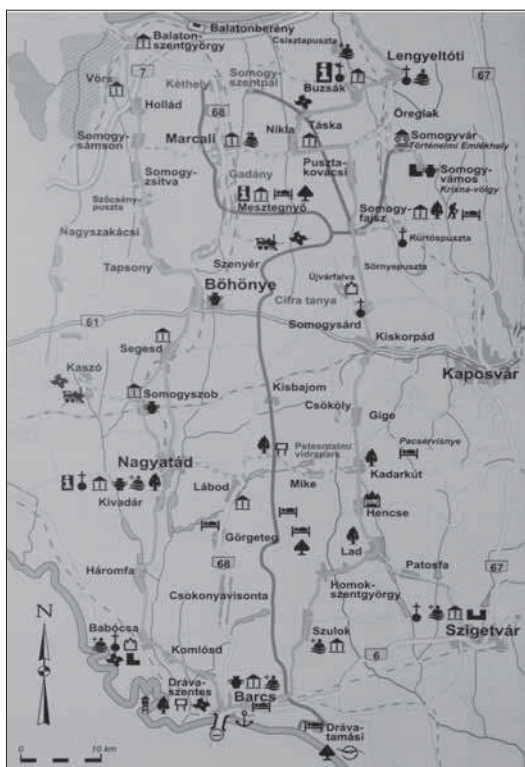
90 per cent of the respondents would take part in a new ecotourism cluster. They primarily would expect an environmentally friendly and conscious tourism service from this cluster, and secondly a more even distribution of tourist arriving all year around, less environmental pollution and last but not least higher incomes. According to the opinion of the respondents, the management of the cluster is expected to manage and represent the interest of the cluster on the basis of the unified approach and cooperation. It should have good marketing policy, both in the field of business and nature conservation; it has to promote ecotourism effectively, by helping to obtain additional financial resources for the realisation of the ideas and projects of the region. It must be altruistic and enthusiastic, and should help in the implementation of the municipal and small region development ideas and the emergence of these in the national development plans.

Summary

The large part of the South-Eastern European countries (where South-Western Hungary and our region the South-Transdanubium are also situated) is considered as under-developed and/or purely agricultural regions. The development of these regions is often neglected by many of economists in their planning and thinking.

Fig. 3: *The area of ‘Belső-Somogy’ Ecologic Network*

In its fundamentals, this thinking is false and pessimistic; because *the currently successful regions⁷ of the EU were described similarly in the heyday of mass production after the 2nd World War*. As those regions exploited the opportunities given by the central feature of their countries, so, in the same way, the regions of South-Eastern Europe have got the chance to use the opportunities given by the EU-accession.



The results of the successful Delphi research might be the basis of the pragmatic implementation of ecotourism clusters in the National Parks and Nature Reserve Areas in Hungary.

Concluding the perception study in ‘Belső-Somogy’ Ecological Network, the Hungarian SMEs that operate in the tourism sector without any exterior subsidy – regarding both national aid and exterior collective organisations. – believe that at the present time they are not cooperative. These organisations could be encouraged to cooperate with each other by a tourism destination management organisation and by providing some state subsidy.

On the basis of the results of the Delphi research and with reference to the Italian model a ‘pilot ecotourism cluster’ can be developed in the territory of the

⁷ „Third Italy”, West-Austria (Vorarlberg, Tirol and Salzburg), South-Germany (Baden-Württemberg and Bavaria) as well as Danish Peninsula (“Second Denmark”: Jütland)

‘Belső-Somogy’ Ecological Network. The potential participating settlements are as follows: Kéthely, Somogyszentpál, Somogyfajsz, Mesztegnyő, Böhönye, Nikla, Libickozma, Mike, Újvárfalva, Somogysárd, Somogyvár, Babócsa, Drávatamási, Kisbajom, Táská, Barcs. (Figure 3)

Main steps of the development

Although, it is important to establish the background for the development, the development can start parallel, with the following main steps:

- 1) The objectives need to set up on the basis of endogenous resources, with the involvement of the local society (bottom up approach)!
- 2) It is necessary to plan a suitable “development mix” carefully, by considering the eographic potentials and thousand-year-aged handicraft traditions, and in an innovative way!
- 3) In order to support the development, it is important to use the global processes, to build in the new phenomena as fast as possible, but the settled objectives should not be lost!

According to our research, and on the basis of the first three fundamental requirements being achieved and a coherently approach to the above mentioned development steps, the **goal is achievable**:

We can develop ecotourism destinations which are economically successful and at the same time provides a liveable environment.

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